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Folio:

A Publication of The Hanson Publishing Group, Inc.

JANUARY 1990 | THE MAGAZINE FOR MAGAZINE MANAGEMENT | $6.50

ELSA WARNICK

How your magazine markets will change

Changes in the 1990s—in growth patterns, population demographics and the interests of the American consumer—will present opportunities for the magazine prepared to take advantage of emerging trends. Learn how these developments might affect your business. **84**

Circulation direct marketing: New twists on proven techniques

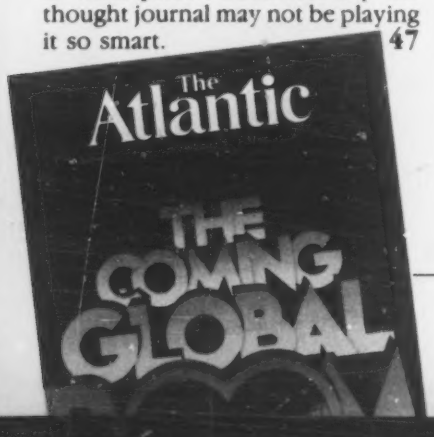
Direct marketers are looking again at their packages—the offer, the devices, how they are mailing—and finding innovative ways to improve on tried-and-true techniques. **99**

The rate-cutting virus

Not only is [illegible] negotiation a "plague," says the head of Reader's [illegible], the concept is destined to backfire: If publishers leave rates open to question, advertisers will question the value of print. **27**

New life at *The Atlantic*?

Circulation and ad pages are up, but at what price? Observers say the thought journal may not be playing it so smart. **47**



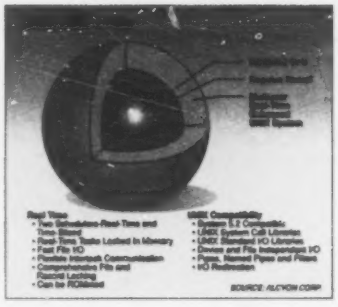
Jim Autry: Poet and president

The workplace is the new neighborhood and your coworkers are your new family, says this Meredith Magazine Group executive, who brings a new perspective to the art of management. **39**

unfold ►

January 1990

Creative charts and graphs 127



Computers are making information graphics easier to create and the results more exciting than ever—a combination that enhances reader loyalty and trust.

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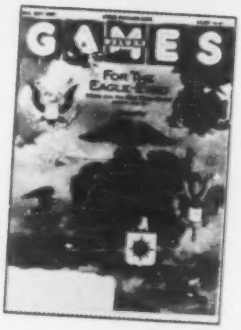

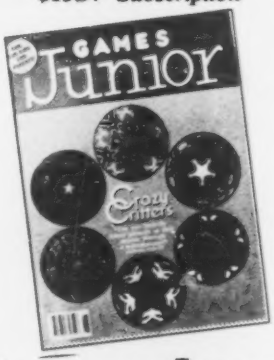

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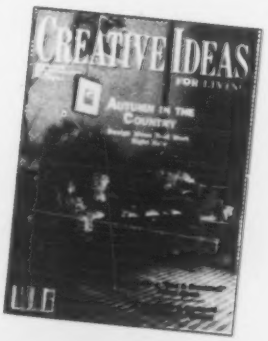

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UPDATE

Solid waste crisis comes home

MPA creates task force, hoping to pre-empt Government action

by Michael Garry

NEW YORK CITY—As the landfill crisis looms, the magazine industry is taking its first step toward finding alternative ways to dispose of magazines—before a solution is forced on it by the Government.

Magazine Publishers of America (MPA), which established a task force on the issue, warns that if the current laws on newspaper recycling are extended to magazines, it could affect the cost of producing and handling them. The task force, which will begin meeting early in 1990, aims to develop a program for dealing with magazine waste "before this gets political and we get hit over the head," says MPA president Donald Kummerfeld.

"Magazine publishers recognize the increasing problem of disposing of all solid wastes, including magazines," says Robert Farley, MPA vice president. "Steps must be taken to recycle, incinerate or find alternative uses for magazine waste."

"Our overall mission is to see what options exist to increase the recycling of all magazines," says task force member J. Rodney Edwards, a vice president with the American Paper Institute.

Glossy magazine paper, because of its high clay content, is not as recyclable as fiber-rich newsprint and corrugated boxes and can't be intermingled with newspapers set aside for recycling. Recycling plants are able to convert magazine paper into building products and cardboard separately, but, given the glut of newsprint and corrugated boxes, many recyclers have been less receptive to magazines.

As a result, wholesalers, responsible for 40 million tons of magazine waste per month, have been finding it more difficult to peddle returns to recyclers. Magazines' clay content also reduces the effectiveness of incineration as a disposal method.

"We need more research to find new products and processes which can utilize magazine paper in recycling," says Edwards. One example of progress: The Oregon subsidiary of St. Louis-based Jefferson Smurfit Company has begun using a new technology that converts magazine paper into newsprint. Several wholesalers in the Northwest are selling magazine returns to this firm.

Low priority

Most magazine publishers, although giving the solid waste crisis plenty of editorial attention, have yet

(CONTINUED ON PAGE 26)

Business titles slip as consumer books gain

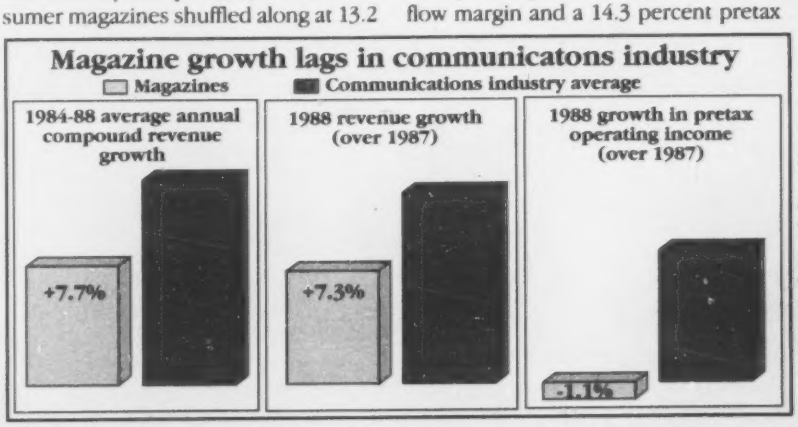
Veronis, Suhler report also shows magazines lag behind other media in profitability

by Liz Horton

NEW YORK CITY—Five years ago, business magazines ruled in profitability. Their operating cashflow margins were nearly 20 percent, while consumer magazines shuffled along at 13.2 percent. Now an annual industry report card shows the balance shifting, with consumer magazines poised to surpass business titles in profitability.

Even so, profitability for all magazines has remained well below that of the communications industry average, according to Veronis, Suhler & Associates' seventh annual Communications Industry Report, a five-year survey of 275 publicly held communications companies.

Overall, the communications industry averaged a 19.9 percent cashflow margin and a 14.3 percent pretax



***Although magazines have shown** below average growth in the communications industry, they have still outperformed the overall economy in the past five years.*

operating income margin in 1988. It has continued to show higher profits than almost any other segment of American industry, points out J. Michael Hadley, executive vice president of Veronis, Suhler.

The industry report tracks radio and television broadcasting; cable television broadcasting; filmed entertainment; recorded music; newspaper, book and magazine publishing; business information services; and advertising agency services.

The outlook for consumer magazines is strong, according to John Suhler, president and co-CEO of Veronis, Suhler. Increased ad spending and circulation growth in 1988 bumped consumer magazine revenues up 7.0 percent, to $3.3 billion. Although the report tracks only the 10 publicly traded consumer magazine companies, their revenue growth figures mimic those of the consumer magazine industry as a whole, according to the report.

The increase in consumer ad spending is likely to continue, says Suhler. Net ad revenues were up 8.0 percent in 1988, after four years that averaged 4.4 percent growth annually. As for 1989, gross year-to-date figures from the Publishers Information Bureau were up as high as 11.9 percent by November, but this does not reflect discounts or negotiated rates.

Automotive and toiletry/cosmetics, the two largest magazine advertising categories, increased spending 18.8 percent in 1988. Even categories that had decreased spending over 1984 to 1987, such as liquor, cigarettes and computers, were up slightly in 1988.

Profit margins in 1988 were lower than in 1987 but still higher than in 1984. Operating cashflow margins dropped 0.9 percent, to 14.7 percent, and pretax operating income margins also dropped 0.9 percent, to 13.1 percent. The overall five-year increase stemmed mostly from Time Inc.'s 1987 $82 million reduction in costs; Time Inc. Magazine Co. income accounts for over 50 percent of the revenue for the 10 publicly traded consumer publishers measured.

Highest cashflow

Consumer magazines, with their low asset base, had the highest relative cashflow returned of any media segment measured. This has made them attractive investments and contributed to the past decade's mega-transactions, says Suhler. The operating cashflow return on assets (ROA) in 1988 averaged 30.2 percent, compared to a communications industry average of 16.2 percent.

For business and professional publishers, the picture is less optimistic. Although the report shows revenues up 7.7 percent, to $2.6 billion, in 1988, it cautions that the growth largely reflects acquisitions by publicly traded companies, since revenue growth for the entire business magazine industry measured only 4.7 percent.

Suhler predicts it will take another two to three years before business-to-business advertisers are on the upswing.

Operating income margins dropped 1.3 percentage points, to 12.6 percent; cashflow margins were down 1.4 points, to 15.9 percent. Over five years, pretax operating income margins went down 5.4 points and operating cashflow margins went down 3.9 points.

But the figures, in large part, reflect a decrease in earnings at Capital Cities/ABC that has continued since the stock market crash of 1987. (Cap Cities and McGraw-Hill together account for 53.5 percent of the gross 1988 revenue for the 18 publicly held companies.) Publications in healthy industries continued to do well—Reed International, for instance, with child care, health and medical care and interior design publications, posted a 48.6 percent increase in operating income in 1988.

Overall, however, stagnant advertising growth resulted from consolidations and cost-cutting at heavy-manufacturing companies. The picture improved slightly in 1988, but, according to the report, "business magazine advertising has grown at only half the rate of the overall economy since 1985." Suhler predicts it will take another two to three years before business-to-business advertisers are on the upswing.□

Publishers balk at passing the buck

Reader's Digest's notion of eliminating the RDA wins few converts

by Susan Hovey

NEW YORK CITY—Six months after *Reader's Digest* stirred up the single-copy sales community by eliminating its retail display allowance (RDA) program, industry members say other titles are unlikely to follow suit any time soon.

Most industry members agree that the RDA is in need of an overhaul. But opinions vary, with a wait-and-see attitude prevailing, when discussion turns to the *Digest* action.

"Although it's a bold move," says Frank Herrera, president of national distributor ICD/Hearst, "done the way it was done, it probably set back the industry by three or four years."

Under the plan, *Reader's Digest* now gives retailers a 30 percent discount up front off the $1.89 cover price on each copy delivered to the store—with the wholesaler responsible for passing along that discount to the retailer.

The previous rebate program gave retailers a 20 percent discount up front, then required them to file for an

(CONTINUED ON PAGE 26)

PAUL MCGUIRK

"The [RDA] check is a big selling tool,"—one reason that publishers are reluctant to change programs.

showing that mail in brown sacks gets better treatment than mail in white sacks. "Second class mail is second class mail," says Stanley, "and it should be handled the same."

Sticker fix

Delays in service are already a problem. A study by the Red Tag News Publications Association reveals 40 percent on-time delivery for weeklies during the third quarter of 1989.

The only option available to weeklies, say Farley and Don Dolman, director of distribution for Ziff-Davis, may be to spend more plant time preparing magazines for mail. Ziff's weekly *MacWeek*, for example, already has a bright red sticker on its mail sacks to alert carriers that editorial is timely. "We do that in hopes that it will catch the eye, if not the attention, of mail processing," says Dolman. Fairchild is considering additional local entry points for several of its magazines, hoping for a better chance of punctual delivery, says Farley.

Ironically, the switch to brown sacks could improve the delivery of monthly titles if delivery of weeklies falls off, says Dolman. "There has to be an impact," he says. "2C publications will get the advantage. . . ."

The USPS wanted to implement the change more than three years ago, but the plan never got off the ground because of a shortage of brown sacks. The current plan was started in the western region in November; the USPS will evaluate its success before phasing in the southern, northeastern, central and eastern regions.

Supply vs. demand

But "we still can't get enough brown sacks," says one printer, adding that supply problems could prevent the Postal Service from moving into a second region within the next year.

Moreover, the USPS is moving so slowly that, "by the time it's completely implemented, they will probably move to trays anyway," says Mike Armstrong, director of manufacturing for *U.S. News & World Report*.

The weekly *U.S. News* ships approximately 90 percent of its mail on pallets, which speeds the process. The USPS plan is not likely to impair the magazine's mailing schedule, Armstrong believes. He notes, however, that the brown sack conversion "has the potential" to affect delivery of weeklies negatively.□

Weekly delivery worst in South

FLOSSMOOR, ILL.—Sixty percent of weekly magazines were delivered late in the third quarter—significantly worse than the 55 percent that were late the previous year, according to Red Tag statistics. Throughout the country, 30 percent were delivered one day late and another 30 percent were delivered even later.

Delivery was poorest in the Deep South. Houston showed only 13 percent on-time delivery, with 29 percent of its titles one day late and 58 percent more than one day late. In New Orleans, 62 percent of publications were delivered more than one day late, while Dallas and Atlanta had less than 30 percent on-time delivery.

On the other hand, cities in the Northwest exceeded the national average. San Francisco posted 71 percent on-time delivery, with just 13 percent more than a day late. Seattle posted 64 percent on-time delivery.

Delivery of monthlies shows slight improvement

FLOSSMOOR, ILL.—Nearly three-quarters of monthly magazines were delivered late during the third quarter of 1989, a slight improvement over the 76 percent in third quarter 1988, according to Red Tag statistics. Only 8 percent of the monthlies exceeded the United States Postal Service standards; 19 percent were delivered on time.

Minneapolis posted the best delivery, with 49 percent of monthlies delivered better than USPS standard.

Only Seattle, Miami and San Francisco also had more than half of monthlies delivered on time.

Worst delivery was posted by Washington, D.C., where 45 percent of monthlies were delivered over four days late, and only 33 percent met or exceeded USPS standards. Other cities plagued by tardy delivery were Buffalo, New Orleans, Memphis, Los Angeles, Atlanta and Phoenix.

The scores reflect delivery from all parts of the nation to the cities listed.□

Delivery box score: Monthlies

July 1-September 30, 1989

City/(Zip Code)	Better than USPS standard	Service standard	Days late 1-3	4-6	7-10	Later
Composite average*	8	19	53	15	4	1
Boston (021)	3	23	54	18	2	0
New York (100)	2	21	63	14	0	0
Buffalo (142)	0	34	33	33	0	0
Pittsburgh (152)	5	7	62	20	4	2
Washington, D.C. (200)	6	27	22	41	4	0
Atlanta (303)	2	9	56	26	7	0
Miami (331)	26	33	29	8	2	2
Memphis (381)	0	0	64	18	18	0
Cincinnati (452)	3	23	58	12	4	0
Detroit (482)	12	21	61	6	0	0
Milwaukee (532)	9	26	6	0	0	0
Minneapolis (554)	49	17	30	4	0	0
Chicago (606)	0	19	65	8	5	3
New Orleans (701)	8	14	41	14	14	9
Dallas (752)	4	7	74	7	4	4
Houston (770)	7	17	65	11	0	0
Denver (802)	25	8	56	8	3	0
Phoenix (850)	0	37	38	25	0	0
Los Angeles (900)	4	21	42	27	2	4
San Diego (921)	12	25	63	0	0	0
San Francisco (941)	14	40	38	2	4	2
Seattle (981)	34	27	36	3	0	0

*Includes other U.S. cities and SCFs not listed.

Source: Red Tag News Publications Association, Inc.

Uncoated paper outlook

Uncoated paper offers, in some instances, opportunities to increase quality and control costs. What is the availability? What are the emerging trends in usage?

BY ARTHUR C. VEVERKA

While the grades of paper most widely used by publishers continue to be coated groundwood and free sheet (covered in the December issue), we believe uncoated paper grades will become increasingly important to magazine publishers in the future.

Some clear trends are emerging:

- A longer-term shift within uncoated groundwood papers from machine finished (MF) to supercalendered (SC) will become evident in 1989-1990.
- Continuing improvements in supercalendered grades will mean publishers may be able to lower costs without affecting quality.
- The supply/demand balance for uncoated grades seems to be tipping slightly in favor of the buyer.

Uncoated grades defined

Like coated paper, uncoated paper is represented by both groundwood and free sheet grades. The similarities, however, end at this point. Whereas coated free sheet is used in preference to coated groundwood when one is looking to upgrade, the same is not true in the uncoated grades. Rather, uncoated groundwood grades are often the precursor to the use of coated groundwood grades. Uncoated free sheet grades have distinct, and for the most part non-substitutable, uses that do not lend themselves to upgrading. Furthermore, these uses are not suitable for groundwood grades.

Within the uncoated groundwood

Arthur C. Veverka is president of Jaakko Poyry Consulting, the Briarcliff Manor, New York-based subsidiary of an international consulting and engineering firm specializing in forest products, printing and print media. Veverka had been vice president and internal consultant for Champion International, and vice president, corporate planning for St. Regis Corporation.

What are uncoated groundwood printing papers?

In the world of printing papers, close to 37 million tons of paper are consumed annually for some type of printing purpose. At the low end, almost one-third of all paper is defined as newsprint—the grade most commonly used in the daily newspaper. At the high end are coated printing papers, with coated #1 grades representing the best available offering (based on brightness), and coated #5 grades being the commodity end of the coated paper business. (A little over 42 percent of the paper used to print catalogs is coated #5.)

Sandwiched between newsprint, but just below coated papers, are some three-plus million tons of papers falling in the spectrum defined by the American paper industry as "uncoated groundwood printing papers." (These grades can be referred to as uncoated wood containing, uncoated mechanical grades.) The diversity of grades in this spectrum is wide, and there are numerous grade options to fit many applications.

From a technical standpoint, uncoated groundwood grades typically contain a relatively high amount of "ground up" mechanical fiber (at least 10 percent of a sheet's typical fiber composition). New pulping technologies have created a new generation of fibers replacing many of the standard groundwood pulps in many paper grades. The addition of twin wire formers, sizing presses, improved fillers and bleaching agents, and other related finishing equipment has brought dramatic improvements to a grade category that must follow in the footsteps of coated paper. Some of the many uncoated groundwood grades currently used in publications include the following:

- **Improved news**: A grade that is just a step above newsprint used in paperback books and used occasionally in magazines for special short stories.
- **Low brightness machine finished (MF) grades**: These can be used for both nonheatset web-offset and rotogravure printing. Typically brightness is under 65.
- **Colored groundwood printing papers**: Suitable for both heatset, nonheatset and rotogravure printing, the range of colors can often be custom-made to meet the needs of a specific editorial or ad format.
- **High brightness MF grades**: These can be used for gravure, nonheatset and heatset web-offset printing. Brightness can range from 65 to as high as 75. In some cases, these grades are surface sized and may even contain some clay in their mix.
- **Lightweight catalog/directory paper**: This paper, either white or yellow, can be used in mail-order catalogs or telephone directories. Basis weights in this grade category can be as low as 20 pounds.
- **SC-C**: This is the third level of the supercalendered paper grade range. This grade is a highly supered, yet unfilled, sheet. (Highly filled sheets tend to contain more clay, which makes for a better printing surface.) There are many users who feel that with high ink coverage, this sheet, which is closely competitive with SC-B (see below), can be superior to SC-B. Some printers employ special inks for SC-C, which result in a very high printed gloss.
- **SC-B**: The second of the SC grade categories. This grade tends to have a minimum amount of filler (up to 10 percent to 12 percent) and is not supered to the extent that SC-A is finished.
- **SC-A**: The first level of the SC market. This grade tends to have the highest filler level (18 percent and above filler), and is highly supered to provide a smooth printing surface. Historically, a grade most often used for gravure printing, new generation SC-A grades have been developed to handle heatset web-offset printing.
- **SC-A+**: The newest level of improvements in this market are indicative of the SC-A+ grades being imported to the United States. In limited supply, these grades are surface sized and have improved base sheet formation for better acceptance of heatset web-offset printing.

Uncoated groundwood: Supply/demand profile United States and Canada (000 short tons)

	1987	1988	1989	Forecast 1990
United States				
U.S. shipments:	1,485	1,624	1,610	1,615
Domestic	1,429	1,554	1,530	1,525
Export/Canada	33	30	35	40
Export/other	23	40	45	50
U.S. Imports:	1,737	1,802	1,920	2,025
From Canada	1,167	1,282	1,420	1,500
From all other	570	520	500	525
Consumpt/demand	3,166	3,356	3,450	3,550
U.S. capacity	1,650	1,696	1,762	1,765
U.S. oper. rate %	90.0%	95.7%	91.4%	91.5%
Canada				
Can. shipments	1,498	1,632	1,770	1,895
Domestic	241	249	250	275
Export/U.S.	1,167	1,282	1,420	1,500
Export/other	90	101	100	120
Can. imports	64	63	70	75
From U.S.	33	30	35	40
From all other	31	33	35	35
Consumpt/demand	305	312	320	350
Can. capacity	1,499	1,648	1,885	2,028
Can. oper. rate %	99.9%	99.0%	93.9%	93.4%

Source: Jaakko Poyry Consulting

Price drops forecast: *The expected overcapacity of coated groundwood will probably mean downward pressure on uncoated groundwood prices.*

classification there are two basic grades—machine finished paper and supercalendered paper. Machine finished grades range from improved newsprint to directory papers to business forms. Overall, almost 88 percent of uncoated groundwood grades are used in the printing industries—which of course includes magazines. Magazines alone account for 18.5 percent of total usage.

The uncoated free sheet grades encompass bond and writing paper, forms bond, converting grades (such as envelope and tablet), text and cover paper and a range of offset printing grades. Because of the significant use in nonprinting applications, only 19.6 percent are used within the printing industry, and less than 1 percent by magazines.

User's dilemma

The drive by publishers for better quality in their printed pieces is often coupled with a desire to control costs. Until recent years, controlling cost usually meant sacrificing quality. However, the highly filled grades of supercalendered paper—SC-A and SC-A+—may be changing that. The latter grade is available only from offshore suppliers and represents the continued progression to upgrade the printing characteristics of uncoated groundwood grades. Given the superior printing results that are possible from these supercalendered grades, it would seem that publishers can potentially satisfy both the desire to increase quality and to keep costs in line. (This will be explained in more detail later in this article.)

With uncoated free sheet grades, however, the cost/quality dilemma is not as evident. The reason is simply that the uses of coated and uncoated free sheet are well established. There is little, if any, movement between the grades either to improve quality or reduce cost.

The demand outlook

With one exception, namely directories, the primary uses for uncoated groundwood grades are similar to the end-uses for coated papers—*i.e.*, magazines, catalogs and inserts/fliers.

Directories consumed over 600,000 tons of uncoated groundwood paper in 1988. Virtually all of this was MF grades. Fueled by increasing numbers of telephone directories, growth in this end-use should be in the 2.8 percent per annum range for both 1989 and 1990.

For magazines, about 17 percent of the total paper usage is represented by the uncoated groundwood grades. In absolute tonnage terms, this amounted to 620,000 tons in 1988. For 1989, a 2.5 percent increase is expected.

While we do not expect any significant shift in the short run between the percentage of coated and uncoated paper used in magazines, a longer-term shift within uncoated papers from MF to SC will become evident in 1989 and 1990.

Catalogs, like magazines, use a variety of paper grades, with coated paper being dominant. Nevertheless, almost 18 percent of the paper used, or some 420,000 tons, represents uncoated groundwood. Projected 1989 demand is almost 440,000 tons.

The last major end-use for uncoated groundwood paper is the insert/flier market. Total paper usage for this application approached 2.3 million tons in 1988. Uncoated groundwood represented almost 37 percent of this total, with SC grades predominant (80 percent). Growth in the insert/flier market has been excellent, and should continue so in 1989 (5+ percent).

As for the uncoated free sheet grades, magazines and catalogs represent only minor uses with volumes of 100,000 tons and 74,000 tons, respec-

tively, in 1988.

One of the larger uses within the printing industry is for direct mail. Usage in 1988 was 500,000 tons. Similar tonnage levels were also recorded for book publishing. Miscellaneous commercial printing applications absorb the largest printing industry volumes of these grades, amounting to 1.27 million tons.

Growth prospects for the major printing industry end-uses for uncoated free sheet will be dampened by the expected economic slowdown in 1990. This translates into a growth rate of under 2 percent.

The overall printing industry demand for uncoated grades is as follows: Uncoated groundwood, 2,946,000 tons in 1989; 3,035,000 tons in 1990. Uncoated free sheet, 2,314,000 tons in 1989; 2,348,000 tons in 1990.

SC paper: A trend to watch

In Western Europe, SC paper has, for a long time, been the preferred grade for magazines. In the last few years, however, coated groundwood papers have made significant inroads, although SC still represents over 50 percent of magazine paper usage. Nonetheless, European SC paper producers have not been idle in the face of this encroachment. They have improved the overall quality of their SC sheets and created what amounts to an SC-A+ grade. Given good quality printing, the lay person is unable to distinguish between coated groundwood and SC-A+ sheets. This creates an opportunity for U.S. magazine publishers and printers.

The higher quality SC-A+ grades that we believe will be available to buyers means that no longer will the use of an uncoated grade be equated with lower print quality. For certain, coated paper will still give a very high quality look—but publishers, advertisers and printers can at least consider SC-A paper without feeling that quality will be sacrificed. The added benefit is lower paper cost—in the 15 percent to 18 percent range.

A trend that may occur in the future involves a shift from uncoated/coated offset printed magazines to gravure printed SC papers. The improved quality levels of SC-A papers would allow for four-color placement anywhere in a magazine and offer greater opportunities for attracting major advertisers.

Paper buyers are also learning that for certain markets, the higher gloss and basis weights of coated paper are not required. Similarly, certain sections of magazines may be perfectly satisfactory with a good quality SC sheet. As stated earlier, with higher quality SC-A paper becoming available, publishers should be able to lower costs without affecting the magazine's image.

Supply outlook

The current supply pictures for uncoated groundwood and uncoated free sheet are decidedly different. In 1988, close to 54 percent of the U.S. demand for uncoated groundwood was supplied by non-U.S. producers. Canada is the major source of these imports, accounting for 71 percent, or almost 1.3 million tons. With planned capacity expansions, Canada is expected to add over 200,000 tons to this figure over the next two years. Offshore import volume, representing the higher quality grades, will remain stagnant. U.S. capacity will increase only slightly, but will be shifted more toward the SC-A grade.

The good news for U.S. buyers is that the two U.S. suppliers of SC-A paper—Madison and Lake Superior—have both indicated they are considering new production facilities. This could add as much as 500,000 tons. We also expect Canadian producers to show more interest in SC-A paper.

For uncoated free sheet the picture

Uncoated free sheet: Supply/demand profile
United States and Canada
(000 short tons)

	1987	1988	1989	Forecast 1990
United States				
U.S. shipments:	10,977	11,277	11,375	11,620
Domestic	10,919	11,194	11,275	11,500
Export/Canada	22	45	50	60
Export/other	36	38	50	60
U.S. Imports:	433	616	725	825
From Canada	211	267	350	425
From all other	222	349	375	400
Consumpt/demand	11,352	11,810	12,000	12,325
U.S. capacity	11,520	11,897	12,352	12,721
U.S. oper. rate %	95.3%	94.8%	92.1%	91.3%
Canada				
Can. shipments	954	1,028	1,259	1,396
Domestic	702	731	889	941
Export/U.S.	211	267	350	425
Export/other	41	30	20	30
Can. imports	32	65	65	70
From U.S.	22	45	50	60
From all other	10	20	15	10
Consumpt/demand	734	796	954	1,011
Can. capacity	1,056	1,153	1,457	1,672
Can. oper. rate %	90.4%	89.2%	86.4%	83.5%

Source: Jaakko Poyry Consulting

***Soft pricing** looks like the order of the day for at least the next 12 months for the uncoated free sheet grades.*

North American uncoated groundwood capacity increases

(by company name)

Year	Company	Location	Tonnage (short tons)	Comments
1988	**Abitibi-Price**	Alma, Quebec	50,000	Grade change to directory paper (#9 PM)
	Lake Superior	Duluth, MN	245,000	New machine for SC-A paper
	St. Mary's	Sault St. Marie, Quebec	77,000	New machine for SC-B (130,000 net 77,000)
1989	**Abitibi-Price**	Alma, Quebec	50,000	Grade change to directory paper (#10 PM)
	Consolidated Paper	Three Rivers, Quebec	33,000	Switched from kraft to SC-C
1990	**Kruger**	Three Rivers, Quebec	39,000	Grade change to SC-B
1991	**Daishowa**	Port Angeles, WA	150,000	New machine for directory and offset paper
1992	**Kruger**	Connenbrook, Nfld.	77,000	Grade change to SC-B
Total uncoated groundwood expansion (short tons)			**721,000**	

Source: API & Jaakko Poyry Consulting

More to come? *Uncoated groundwood capacity increases that are not reflected in the chart above may still occur if suppliers Madison and Lake Superior open new production facilities, as they have indicated.*

North American uncoated free sheet capacity increases

(by company name)

Year	Company	Location	Tonnage (short tons)	Comments
1988	**Boise Cascade**	Wallula, WA	18,000	Improvements
	Georgia Pacific	Port Hudson, LA	300,000	New machine
	International Paper	North & South	150,000	Improvements
	Potlatch	Cloquet, MN	(40,000)	Switched to coated free sheet
	Weyerhaeuser	Prince Albert, Saskatchewan	200,000	New machine
1989	**Canadian Pacific**	Dryden, Ontario	195,000	Rebuild
	Champion	Courtland, AL	40,000	Machine rebuild
	Champion	Pensacola, FL	115,000	Machine conversion
	Domtar	Windsor, Quebec	160,000	Net from new machine
	Hammermill	Selma, AL	35,000	Speed-up
	International	North & South	200,000	Improvements
1990	**Boise Cascade**	International Falls, MN	308,000	New machine
	Champion	Courtland, AL	20,000	Machine rebuild
	Champion	Courtland, AL	45,000	Machine rebuild
	Island Paper	New Westminster, B.C.	(50,000)	Switched to coated free sheet
	Westvaco	Wickliffe, KY	(100,000)	Switched to coated free sheet
	Willamette	Bennetsville, SC	200,000	New mill
1991	**Nekoosa**	Ashdown, AL	325,000	New machine
	Union Camp	Eastover, SC	240,000	New machine
	Union Camp	Eastover, SC	50,000	Machine improvement (#1)
Total uncoated free sheet expansion (short tons)			**2,411,000**	

Source: API & Jaakko Poyry Consulting

Most of the capacity increases *for uncoated free sheet will be in the commodity grades, but that will result in the freeing up of some capacity (on small paper machines) to produce more specialized grades needed by the printing industry.*

is indeed different. To start with, some 1.8 million tons of new capacity is expected in North America over the 1989-1991 period. Although most of this will be targeted for commodity grades, it will result in the freeing up of some capacity (on small paper machines) to produce the more specialized grades needed by the printing/publishing industry.

The import situation is also very different for uncoated free sheet. In 1988, imports accounted for only 5 percent of total demand. This figure is projected to rise to 6.7 percent in 1990, primarily because of planned capacity increases in Canada. Most of the offshore imports are for specialty, niche grades.

Supply/demand balance

All things considered, it seems that the supply/demand balance for both uncoated grades is tipping slightly in favor of the buyer. Even if the United States avoids an economic slowdown in 1990 or experiences a rapid recovery in 1991, the supply/demand balance will work against the producers.

Projected U.S. operating rates for uncoated groundwood for 1989 and 1990 are in the 91.5 percent range. This is a decline of over 4 percent from the 1988 levels. In Canada, the decline is likely to be greater (approaching 6 percent) as significantly more capacity is brought on line (23 percent over a two-year period).

"A strengthening dollar could increase the attractiveness of this market and swing the supply/demand balance more in the buyer's favor."

Offshore suppliers will continue to look at the United States as a home for their higher quality products. A strengthening dollar could increase the attractiveness of this market and swing the supply/demand balance further in the buyer's favor.

The uncoated free sheet picture is even better from a buyer's perspective. U.S. operating rates are expected to decline from a level of 98.3 percent in 1988 to 92.1 percent in 1989, and 91.2 percent in 1990. The causes are flat demand and increased capacity (7 percent).

Because of capacity increases of 45 percent over the 1988-90 time frame, the Canadian supply/demand picture looks even bleaker for producers of uncoated free sheet, and even brighter for purchasers. Operating rates could reach a low point of 83.5 percent in 1990.

As a result of these supply/demand outlooks, we could expect stable prices for uncoated groundwood. However, as indicated in Part 1 of this report, there will be an overcapacity of coated groundwood over the period. This will probably mean downward pressure on uncoated groundwood prices. For the uncoated free sheet grades, soft pricing looks like the order of the day for at least the next 12 months. □

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Application deadline: May 5, 1990

New magazines: 1989

During the past year, over 165 existing publishing companies and entrepreneurs launched magazines. The new publications cover a wide range of businesses—from cattle raising and marketing to running a newspaper. The consumer marketplace welcomed Time Inc.'s celebrated *Sports Illustrated for Kids*, while Nason & Associates began the less publicized *Carolina Women Today*. A host of other publishers also pursued their publishing dreams and came up with colorful titles like *Neon*, *24 Hours* and *Upside*. Following is a list of titles, of at least quarterly frequency, that were announced to FOLIO: in 1989.

Business magazine start-ups—1989

Magazine title	Company name City/state	Audience	Circulation in thousands	Type of circulation	Start-up month
24 hours	Schneider Publishing Co. Santa Monica, CA	People active in the late night	35	Np	May
516	516 Publishing Co. Massapequa, NY	Residents of Long Island (the 516 area code)	45	Np	May
Aerospace and Defense International Product News	McGraw-Hill New York, NY	Industry decision makers	88	Np	Jul
Aquatics	Communication Channels, Inc. Atlanta, GA	Operators of public pools	30	Np	Feb
Asia Pacific Aerospace	Asian Business Press Singapore	Commercial aviation and defense industry buyers	N/A	Np	Jun
Automotive Electronic News	Fairchild Publications New York, NY	Auto and electronic industry managers	32	Np	Jan
Billion	Billion Publishing Hong Kong	N/A	25	N/A	Jul
Body Copy	Breznau Pub. Co., Inc. Los Angeles, CA	Los Angeles ad industry	20	Np	Mar
Business Travel Management	Coastal Communications Corporation New York, NY	Corporate travel planners	40	Np	Sep
Business of Sports	Business of Sports, Inc. Cincinnati, OH	Consumers interested in sports business	400	P	Sep
CD-ROM Enduser	DDRI, Inc. Falls Church, VA	Users of CD-ROM	10	Np	May
CG Professional	Graphic Channels Inc. San Francisco, CA	Users of computer graphics products and technologies	25	P	Jan
California Agricultural Exporter	Western Agricultural Publishing Co. Fresno, CA	California agricultural industry	12	Np	Jan
Canadian Direct Marketing News	CDMN Publishing Markham, Ontario	Canadian direct marketers	6	Np	Oct
Casting Design & Application	Penton Publishing Cleveland, OH	OEM designers and buyers of castings	22	Np	Nov
Cattle	HBJ Farm Publications Orlando, FL	People who raise and market cattle	362	Np	Sep
Century City	Affinity Publishing Calabasas, CA	Century City businesses	30	Np	Mar
College Athletic Management	College Athletic Administration Ithaca, NY	College athletic administrators	N/A	N/A	Jan
Computerworld Focus on Integration	CW Publishing Inc. Framingham, MA	Executives who link large computer installations	135	P	Feb
Contemporary Internal Medicine	Aegean Communications Greenwich, CT	General internists	91	Np	Apr
Contemporary Urology	Medical Economics Co. Oradell, NJ	Urologists	9	Np	Feb
Contingencies	Academy of Actuaries Washington, D.C.	Academy members and CEOs of Fortune 1,000 companies	20	P & Np	May
Corporate Risk Management	Oster Communications, Inc. Cedar Falls, IA	CFOs and financial executives	25	Np	Jun
Defense Technology International	Horizon House, Inc. Norwood, MA	Defense executives	30	Np	May
Defense World	McGraw-Hill New York, NY	Members of Federal Government, academic and financial communities	145	P & Np	May
Dermatology Nursing	Dermatology Nurses' Association Pitman, NJ	Dermatology nurses	6	P	Oct

(CONTINUED)

Business magazine start-ups—1989

Magazine title	Company name City/state	Audience	Circulation in thousands	Type of circulation	Start-up month
Diablo Business	Diablo Country Magazine, Inc. Walnut Creek, CA	Business people in the San Francisco area	18	Np	Jul
Electronic World News	CMP Publications, Inc. Manhasset, NY	Engineers	32	Np	May
Environment Today	Enterprise Communications McLean, VA	Environmental control officers	54	Np	Jan
Executive Living	Business Journal Publishing Co. Cleveland, OH	Business executives in northeast Ohio	27	Np	Nov
Expert Systems	Auerbach Publishers New York, NY	Management information systems (MIS) professionals who use expert systems	3	P	Feb
F&B Marketplace	Food Marketing Communicators Shawnee Mission, KS	Food and beverage marketing professionals	5	P & Np	Jun
Fabrics & Architecture	Industrial Fabrics Association International St. Paul, MN	Architects and designers	4	P	Jul
Family Business	MLR Publishing Co. Great Barrington, MA	Second-generation family business owners	100	P	Nov
Focus on AIX	Publications & Communications, Inc. Austin, TX	IBM Advanced Interactive Executive users	15	P & Np	Jan
Food People	Associated Grocers, Inc. Seattle, WA	Supermarket employees and the general public	4	Np	Apr
GATF World	Graphic Arts Technical Foundation Pittsburgh, PA	GATF members	7	Np	Jan
Golf Course News	United Publications, Inc. St. Petersburg, FL	Superintendents and developers	20	Np	Feb
Home Healthcare Dealer	Curant Communications, Inc. Los Angeles, CA	Home care dealers and pharmacies	12	Np	Mar
Homeworld Business	ICD Publications Hauppauge, NY	Manufacturers and retailers of housewares	13	Np	Sep
Human Capital	Learning Ventures International Camden, ME	Human resource directors and executives of Fortune 1,000 companies	65	P & Np	Nov
ITC Desktop	International Typeface Corp. New York, NY	Small business and corporate computer users	100	P & Np	Mar
Independent Business	First Sierra Publishing, Inc. Westlake Village, CA	Small business owners	560	P	Dec
Industrial computing	ISA Services Inc. New York, NY	People who purchase computer products	40	Np	Mar
International Development Review	IMP Inc. New York, NY	Heads of government and senior bankers	30	Np	Nov
Kentucky Prairie Farmer	Farm Progress Companies Inc. Louisville, KY	Prairie farmers in Kentucky	12	P	Jul
Link	Yellow Pages Publishers Association Troy, MI	Yellow Page industry personnel	14	Np	Oct
MIPS	MIPS Publishing Inc. Peterborough, NH	Users of 32-bit computer systems	80	P	Feb
MacTech Quarterly	A.P.P.L.E. Co-op and Tech Alliance Renton, WA	Macintosh programmers and developers	20	P	Jan
Matter	GLM Publishing New York, NY	Retailers interested in handcrafted goods	15	Np	Aug

(CONTINUED)

Business magazine start-ups—1989

Magazine title	Company name City/state	Audience	Circulation in thousands	Type of circulation	Start-up month
Microwave Product Digest	Octagon Communications Corp. New York, NY	Microwave engineers	40	Np	Jan
Mobile Product News	Phillips Publishing Potomac, MD	Dealers and company representatives in mobile communications	15	Np	Jun
Modern Warfare	Empire Press Lebanon, PA	Modern war enthusiasts	35	P	Jul
National Limousine Exchange	Turnkey Publishing Austin, TX	Limousine service operators	9	Np	Jan
New Miami	New Miami, Inc. Miami, FL	Businesses in South Florida	18	Np	Jan
News Inc.	A/S/M Communications New York, NY	Newspaper industry	15	Np	Apr
Newspapers and Technology	Summit Media International Golden, CO	Newspaper industry	25	Np	Feb
OBG Management	Dowden Publishing Co. Spring Valley, NY	Obstetricians and gynecologists	31	Np	Sep
Pacific Property	World Property London, England	International real estate players	12	Np	Sep
Paper Trends & Implications	Communication & Information Services Concord, CA	Industry decision makers	N/A	P	Jan
Patuxent Business Digest	Patuxent Publishing Columbia, MD	Business executives in Maryland's Howard County	10	P & Np	Mar
Peanut Grower	Agri-Publications, Inc. Tifton, GA	Large peanut growers	28	Np	Apr
Plastics News	Crain Communications, Inc. Akron, OH	Management in plastics industry	60	P & Np	Mar
Presentation Business News	Pacific Magazine Group Santa Monica, CA	Computer dealers and resellers	30	Np	Oct
Recycling Times	National Solid Waste Association Washington, D.C.	Recycling industry	3	P	Mar
Salon Biz	Canon Communications, Inc. Santa Monica, CA	Salons and their patrons	47	Np	Mar
Selling Space	JB & ME Publishing Los Angeles, CA	Ad sales directors and managers	4	P & Np	Mar
Senior Patient	MN Postgraduate Medicine Minneapolis, MN	Physicians treating elderly patients	133	Np	Jan
Silicon Valley Engineer	Select Communications, Inc. Los Altos, CA	Engineers	40	Np	Feb
Site Development News	Elsevier Business Press Morris Plains, NJ	Corporate site selectors	245	Np	Nov
South Carolina Lawyer	South Carolina Bar Columbia, SC	Members of South Carolina Bar	6	Np	Jul
Space News	Times Journal Co. Springfield, VA	Executives and decision makers for space-related industries	14	Np	Sep
Sports Travel	Murdoch Magazines Secaucas, NJ	Sports-minded travel planners	25	Np	Jun
TECHknowledge	AIMS Unlimited Publishing Group Orlando, FL	Florida's manufacturing decision makers	2	Np	Oct

(CONTINUED)

Business magazine start-ups—1989

Magazine title	Company name City/state	Audience	Circulation in thousands	Type of circulation	Start-up month
TIES	Drexel University Philadelphia, PA	Math, science and industrial arts educators	54	Np	Jan
Tan	Tanning Trends Inc. Jackson, MI	Tanning salons and their patrons	10	Np	Jan
Technology on Campus	Peter Li, Inc. Dayton, OH	College faculty that use computers and other technical equipment	30	Np	Oct
The APA Magazine	Ad-Advertising Photographers of America New York, NY	Professional photographers	8	Np	Nov
The Electronic Studio	Roger Murray & Associates Toronto, Ontario	Professional graphic designers	20	Np	Nov
The Journal of NIH Research	Journal of NIH Research, L.P. Washington, D.C.	Scientists involved in life science research	28	Np	May
Thurman Marketing Services Inc.	The Pick User Digest Laguna Hills, CA	Users of the Pick operating system	7	P & Np	Jan
Trucking/South	Randall Publishing Tuscaloosa, AL	Management in trucking industry	19	P	Jan
Upside	Upside Publishing Co. Palo Alto, CA	High-tech executives in the Silicon Valley	55	P & Np	Jun
Vision Care Assistant	Jobson Publishing New York, NY	Vision care assistants	25	Np	Jan
Voice Processing Magazine	Information Publishing Corp. Houston, TX	Telecommunication managers	10	N/A	Jan
Washington CEO	Washington CEO Inc. Seattle, WA	Top-level business executives in Washington state	20	P & Np	Dec
AZ	Trend Magazines Inc. Phoenix, AZ	State residents with an active lifestyle	60	Np	Nov

Consumer magazine start-ups—1989

Magazine title	Company name City/state	Audience	Circulation in thousands	Type of circulation	Start-up month
About Children	About Children Tuscaloosa, AL	Parents of children ages 2-12	75	P & Np	Jul
Aldus Magazine	Aldus Corporation Seattle, WA	Users of Aldus products	230	Np	Nov
Amiga Plus	Antic Publishing, Inc. San Francisco, CA	Amiga computer users	97	P	Mar
Atarian	Atari Explorer Publications Corp. Mendham, NJ	Atari video game club members	100	P	May
Athens Magazine	Athens Newspapers Inc. Athens, GA	Athens residents	6	P	Mar
Audio/Video Interiors	CurtCo. Publishing Sherman Oaks, CA	Consumers buying audio and video equipment	130	P	Feb
BCV	CareerVision, Inc. New York, NY	Highschool juniors and seniors planning to attend college	250	Np	Sep
Boat	Diamandis Communications Inc. New York, NY	Small powerboat enthusiasts	N/A	P	Jan

(CONTINUED)

Consumer magazine start-ups—1989

Magazine title	Company name City/state	Audience	Circulation in thousands	Type of circulation	Start-up month
Campus Scene	Stamats Communications Cedar Rapids, IA	Midwest college campuses	325	Np	Sep
Canoe & Kayak Racing News	Canoe America Associates Kirkland, WA	Canoe and kayak sport enthusiasts	5	P	Sep
Capital	American City Business Journals Denver, CO	Subscribers to Business Journal newspaper	15	P & Np	Apr
Capital Sports Focus	Capital Sports Focus, Inc. Bethesda, MD	Active sports participants	100	Np	Jan
Carolina Women Today	Nason & Associates Asheville, NC	Women in North and South Carolina	20	P	Jul
Charlotte	New South Press Charlotte, NC	Residents and tourists	15	P & Np	Jan
CitySports	Toma Publishing Minneapolis, MN	Sports and health enthusiasts	45	Np	Apr
Connections	Saga International Holidays Ltd. Boston, MA	Traveling senior citizens	300	P & Np	Apr
Cordiality	Cordiality New York, NY	Upscale, 25- to 39-year-old responsible consumers of alcohol	100	Np	Sep
Corvette	Dobbs Publications Lakeland, FL	Corvette enthusiasts	100	P	May
Country America	Meredith Corp. Des Moines, IA	Country music fans	400	P	Oct
DanceBag	DanceBag Magazine Inc. Norman, OK	10- to 16-year-old girls enrolled in commercial dance studio classes	20	P & Np	Jul
East Coast Windsurfing	ECWM, Inc. Cambridge, MA	East Coast windsurfers	10	P	Jun
Elle Decor	Diamandis Communications Inc. New York, NY	Home owners	200	P	Oct
Emerge	Emerge Communications, Inc. New York, NY	Middle income blacks, ages 25-44	150	P	Oct
Entrepreneurial Woman	Entrepreneur Group, Inc. Irvine, CA	Women who own their own business	200	P & Np	Jun
Eye	Renegade Ventures Atlanta, GA	Southerners	24	P	Jun
Eyes Magazine	TenFifty Publications Los Angeles, CA	Young adults	100	Np	Mar
First for Women	Heinrich Bauer North American Inc. Englewood, NJ	Women	4500	P	Jan
Florida Golf Reporter	Golf Reporter Enterprises Inc. Boca Raton, FL	Avid golfers in Florida	15	P & Np	May
Fox Valley Living	Sampler Publications, Inc. St. Charles, IL	Fox Valley residents and visitors	25	P	Sep
Frisko	Frisko Mag. Inc. San Francisco, CA	Active San Francisco residents	7	P	Jun
Garbage	Old House Journal Corporation Brooklyn, NY	People interested in waste management	50	P	Aug
Healthy Kids: Birth-3	Cahners Publishing Co. New York, NY	Parents of children up to age 3	1500	Np	Jan

(CONTINUED)

Consumer magazine start-ups—1989

Magazine title	Company name City/state	Audience	Circulation in thousands	Type of circulation	Start-up month
Heartland Boating	Heartland Publications Martin, TN	Boaters in and around Tennessee	10	P & Np	Mar
Hook, Line & Sinker	Fishwagon, Inc. Harrisburg, AR	Keepers of small lakes and ponds	2	P	Feb
House Plans	Cahners Publishing Co. Des Plaines, IL	Consumers planning on building houses	N/A	P	Jan
i.e.	The Lakeside Group and The Publications Co. Detroit, MI	International art community	N/A	P	Apr
IRA Investor	American Eagle Publishing Corp. Youngstown, OH	IRA investors	500	P	Jan
Imagen	Casio Communications New York, NY	Hispanic women	7	P	Feb
In View	Whittle Communications Knoxville, TN	College women	750	Np	Mar
InMarin	In.Marin San Rafael, CA	Upscale residents	15	P & Np	Jan
Jobs Today	Omni Graphics Detroit, MI	Career guidance counselors and librarians	1	P	Mar
Kansas City Live!	Blue Cross and Blue Shield Kansas City, MO	Blue Cross and Blue Shield policy holders	64	Np	Oct
KidSports	ProServ, Inc. Washington, D.C.	8- to 14-year olds participating in ProServ sports programs	100	Np	Jul
Laugh Track	Abram Entertainment Publishing Group New York, NY	Comedy club patrons	525	Np	Mar
Log Home Living	Homebuyer Publications Herndon, VA	People who live in log houses	N/A	P	Feb
Long Island Parenting News	RDM Publishing Corp. Island Park, NY	Long Island parents	25	Np	Feb
MBJ	PM Publications Inc. Fall River, MA	Macintosh computer users	30	P	Aug
MSO	Transmedia Partners Englewood, CO	Cable system operators, owners and management	15	Np	Sep
Mas	Univision Publications New York, NY	U.S. Hispanics	500	Np	Aug
Mature Health	Haymarket Group New York, NY	Women 35-45	N/A	N/A	Aug
Minneapolis Women	Talcott Publishing Minneapolis, MN	Women living in Minneapolis	35	Np	Aug
Mirabella	Murdoch Magazines New York, NY	Mature women	400	P	Jun
Motorboat Magazine	Power and Motoryacht Association Stamford, CT	Small powerboat owners	140	Np	Feb
Movies USA	Entertax Industries, Inc. Atlanta, GA	Movie goers	N/A	Np	Mar
Moxie	Weider Health & Fitness, Inc. Woodland Hills, CA	Women over 40	250	P	Sep
Neon	Chicago Magazine, Inc. Chicago, IL	Active participants in the city's nightlife	50	P & Np	Aug
New Jersy Focus	New Jersey Focus, Inc. Hillside, NJ	Sunday newspaper buyers in New Jersey	750	Np	Sep

(CONTINUED)

Consumer magazine start-ups—1989

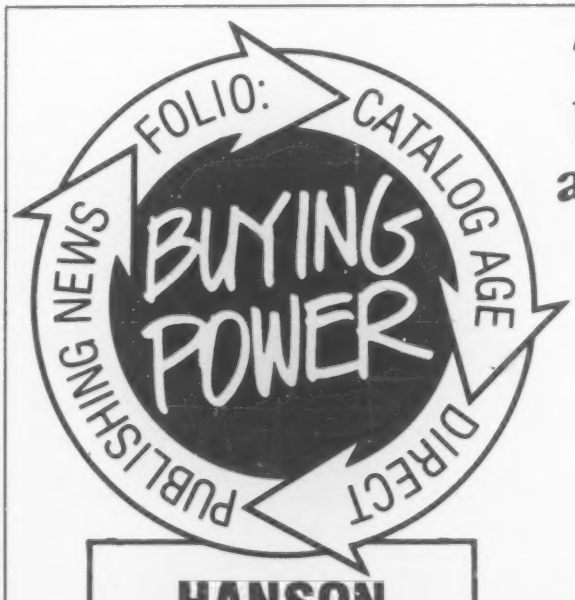
Magazine title	Company name City/state	Audience	Circulation in thousands	Type of circulation	Start-up month
New York Sports Monthly	MJC Publishers Long Island, NY	New Yorkers who watch and participate in sports	150	P	Nov
Newlywed	3/C Publishing Westport, CT	Newly married couples	1250	Np	Apr
Night & Day	Sasquatch Publishing Seattle, WA	Visitors to Seattle	6	Np	May
On Line	Michaelson Entertainment New York, NY	Movie goers	250	Np	Mar
Onyx	Pygmalion Publications, Inc. Laguna Niguel, CA	Beauty salon patrons	25	P & Np	Jan
Orbit Video	Orbit Publishing Vienna, VA	Consumers who buy and rent movies	65	P & NP	Jan
PC Hands On	Mindcraft Publishing Corp. Concord, MA	PC users	50	P	Oct
Portland Life and Business	Pacific Gateway Publications Inc. Portland, OR	Family-oriented residents age 35 and older	50	P & Np	Jan
Quality Living	Mercari Communications Englewood, CO	Aging baby boomers	950	Np	May
Radio-Chicago	Donna Walters & Associates Chicago, IL	Radio enthusiasts	20	P	Oct
Row	FMI Publications Inc. Petaluma, CA	Rowers	35	P	May
Rug Hooking	Commonwealth Communications Services, Inc. Harrisburg, PA	Rug hookers	12	P	May
SF	The California Magazine Partnership San Francisco, CA	San Francisco residents	75	P & Np	May
Seattle Home and Garden	Pacific Northwest Media, Inc. Seattle, WA	Greater Seattle region	25	Np	Sep
Senior American Magazine	Targetmedia Publications Ltd Dundee, IL	Senior citizens	546	Np	Mar
Shaker Spirit	Point Publishing Inc. Point Pleasant, NJ	Shaker lifesyle	25	P	Mar
Snowboarder	The Surfer Publishing Group Dana Point, CA	Snowboard enthusiasts	60	P	Sep
Southern Living's Travel South	Southern Progress Corporation Birmingham, AL	People planning on visiting the South	200	P	Feb
Southern Review	The Guild Bindery Press Oxford, MS	Buyers of Southern cultural and history books	2	P	Jul
Spa Vacations	BW Publishing Inc. Brighton, MA	Spa goers	200	P	Sep
Staten Island	SHM Publications Staten Island, NY	Residents	30	Np	Jan
Texas Bicyclist	Yellow Jersey Enterprises Austin, TX	Serious bicyclists	50	Np	Apr
The Memphis Flyer	MM Corp. Memphis, TN	Memphis residents	25	Np	Feb
The Southwestern Sportsman Magazine	Hetrick Publishing Winkelman, AZ	Hunters and fishermen	12	P & Np	Feb
Times: In harness	Times: Standard Inc. Reynoldsburg, OH	Owners of standard bred horses—breeders and professionals	10	P	Aug

(CONTINUED)

Consumer magazine start-ups—1989

Magazine title	Company name City/state	Audience	Circulation in thousands	Type of circulation	Start-up month
Topaz	Pygmalion Publications, Inc. Laguna Niguel, CA	Hispanics who go to beauty salons	25	P & Np	Jan
UCLA Magazine	University of California, Los Angeles Los Angeles, CA	Alumni, students, staff and area residents	195	Np	Apr
Valley Magazine	Meadowood Publications, Inc. Selinsgrove, PA	Susquehanna Valley residents	30	P	Apr
Vermont Magazine	North Country Publishing Bristol, VT	Vermont lovers	45	P	Sep
WHY	World Hunger Year New York, NY	People interested in hunger and poverty issues	3	P	Jun
Westchester Family	NY Family Publications, Inc. New York, NY	Parents of children living in Westchester	35	Np	Apr
Wigwag	Wigwag Magazine Co., Inc. New York, NY	General interest readers	100	P	Oct
Woodwork	Ross Periodicals Ross, CA	Woodworkers	50	P	Apr

Note: Some start-ups expected for late 1989 had not been announced at press time, and some titles have ceased publication.



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